User Group Meeting

January 25, 2017

WISCONSIN DEPARTMENT OF
PUBLIC INSTRUCTION
Tony Evers, PhD, State Superintendent

The User Group meetings will be slightly different going forward. We will record the first half of the meeting with slides. There will be a written document available of the recording. We will then stop the recording and do live demos if needed and have a question and answer portion.

We have four topics to discuss today. If you have questions or comments please save them for the end of the presentation.

The software update was on Jan. 10, 2017

Previously, statistics reports were available in two different places on the Staff Dashboard. This often caused confusion as to which statistics reports were best to use in different circumstances. Several Borrower and Lender reports (Statistics, Record Counts, Days to Receive/Supply) have been moved from the ILL Admin menu over to the Statistics menu, so that all reports are run from a single menu. No changes were made to the actual reports at this time – they were just moved. There will likely be some additional changes to these reports in the future.

Activity Statistics

The statistics management page is now called *Activity and Request Reports.* It occupies the same menu position as the previously named *Reports and Downloads.*

Statistics

ILL Statistics

Activity and Request Reports
Summary Report
CONTU Copyright Tracking Reports

Previously, the SHAREit ILL statistics were sometimes difficult to run and to understand. The ILL Activity Statistics have been revised and the statistics management page has a new look and a new name.

The new statistical reports are available in HTML, in PDF, and in Excel formats. The statistics management page has been rearranged so that it is easier to select report parameters.

A number of changes have also been made in the resulting statistical reports: Grand Totals data have been moved from the end of each report to the top line of the report, so that a user does not have to scroll through the entire report to see the totals. New statistics are being collected and displayed for Material Bib Level (format) and for Pickup Location. Figures for Unique Requests Sent and for Patron-initiated and Staff-initiated requests are now displayed in separate columns for ease of use. Request Records Reports and Lender Response Records Reports (available only in Excel format) are separated from the Activity Reports, for easier selection. Excel reports now separate Library Code and Library Name into separate columns for easier sorting

Multi-copy Statistics

Borrowing Activity Report for 01/01/2017 to 01/20/2017

\<Grand Totals\>

	Request Attempts	Filled	Not filled	NCIP Hold Placed	Passed to Local System	No response	Unfilled	Referred	Retry	Lost	Expired	Cancelled
Total	474	299	86	0	0	8	78	44	0	0	0	3

In process	Unique Requests Sent	Staff Initiated	Patron Initiated	Multi Created	Multi Requests
86	338	316	32	29	235

Previously, there was no separate reporting of multi-copy requests. Now statistics are available for the number of multi-copy requests created as a Borrower for a date range. Figures are available for the number of times a multi-copy request form was used to create requests, and for how many actual requests were created using this method. New columns have been added to Borrower Activity Statistics for Multi Created and for Multi Requests.

If a multi-copy request form is used to create 10 copies, the value counted in Multi Created would be 1; while the value counted in Multi Requests would be 10.

Multi Requests are included in the count for the overall Request Attempts column.

Once submitted, each separate request created from a multi-copy form is treated the same as any other request for purposes of statistical counting.

Note: There may be rare instances where the Multi Created figure is 0 but the Multi Request figure is > 0. This could happen when the user deletes the first or "master" request and leaves some of the others.

Patron Tracking Messages
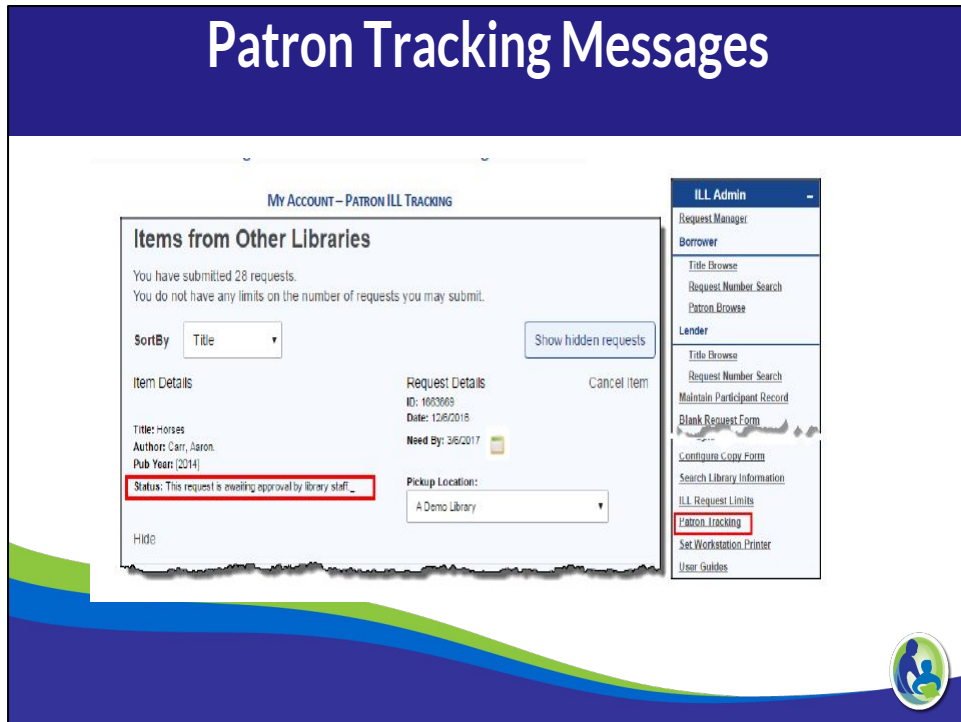
Previously, the messages displayed in Patron Tracking accounts were standard and not configurable for different situations. Users can now customize the messages that patrons see in their ILL Request Tracking accounts. The messages can be configured differently for each status. By default, SHAREit will still display the current standard messages if the staff chooses not to configure their own.

Patron Tracking Admin Screen

PATRON TRACKING ADMIN SCREEN

ILL Admin > Patron Tracking –

PATRON TRACKING

Patron Tracking Login Instructions:
(240 characters max.) 96

To track your ILL requests, enter your name and password that was used to create your requests.

Patron Tracking Login Username Label: Name (Last, First)

Patron Tracking Login Username Label: Passwords

Configure Patron Tracking Messages

Awaiting approval:
(240 characters max.) 52

This request is awaiting approval by library staff.

Cancel shipped request:
(240 characters max.) 120

ILL Cancel Shipped Request has been submitted. Cancel process will be completed once the item arrives at your library.

Cancelled:
(a staff note may be appended to this text)
(240 characters max.) 33

This request has been cancelled.

This new feature also allows the staff to configure text that is displayed to guests when setting up an ILL Patron Tracking account.

[My library owns] added to Z-target holdings

Previously, the [my library owns] message only displayed for the union catalog. It now will include z-target holdings.

Training Modules

Getting started - Browsers;
bookmarks; internet settings;
logging in

Home Screen - resources - indexes -
advanced search - Lists - Quick
links - My Account

This year we will begin to document with video and script, training on the following topics.

Participant Record
Staff and patron user accounts and permissions
Search settings options - 3 places to make changes to search resources - Pac Admin, Guest & Patron User, My Account
Searching - simple and advanced - searching tips
Creating loan requests - photocopy - microfilm -
Patron-Initiated Requesting
Multi-copy - 2 methods
Request Manager - Borrower
Request Manager - Lender
Reading the history information on a request
Pick lists - shipping labels - bookstraps
Statistics
Downloading Marc Records - List function - union catalog as a Z target - local library as a Z target
If you do not see what you were looking for, please let us know.

Annual ILL Meeting

Planning Committee

We would like to sponsor another Annual ILL Meeting in 2017 and would like to hold the meeting farther north than Madison. If you are willing to volunteer for the planning committee, please email Christine at dpirllill@dpi.wi.gov We would need a meeting location with a room big enough for 60-80 people.

Reminders

Borrowers:

Return all paperwork that was sent with an item.

Respond to conditional messages promptly.

Lenders:

Read the borrower's notes!

Respond to requests within 4 days. Within 24 hours is best.

Requests should *never* expire at your location without a response.

These reminders have come from WISCAT users as suggestions to mention during this webinar.

Return all paperwork: if a WISCAT shipping label was used to send the item to you - then please use the other side of the shipping label to return the item. Do not subsitute a pink slip. It makes it more difficult for the lender to determine what the item is - the request #, etc.

Respond to Conditional messages. When the lender puts a request in Conditional status, they are waiting for a response from the borrower. While they are waiting, no work is being done on the request. The longer it takes the borrower to respond, the longer it will take for the request to be processed.

Read the notes!!

Lending requests should never expire at your location without a response. The request manager should be checked daily for new requests. You may also opt to receive an email when a new request is in your pending file. This option is available in your participant record.

Please make sure you have subscribed to the listserv or are a member of the Resource Sharing Google+ community. This is the only way we have of communicating with you.
Thank you for joining us today.